The 3 Recurring Donation Automation Workflows Every Nonprofit Needs

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As you know being more personalized with fundraising in general will help you be more successful– but it's simply impossible to build relationships with thousands of donors at a time. Thankfully, there's a way to simplify your outreach and retain a personalized, relationship-driven donor experience!

The responsive framework lays out exactly how to be more personalized, contextual, and relevant to donors, but implementing that at scale requires automation. Automation is a powerful tool, but it can be a challenge to know where to start. In this step-by-step post, we'll show you how to harness the power of automation – specifically for recurring donations – to save time for your team and encourage greater generosity from your supporters.

The Power of Automation

Before we dive in, let's start with the basics. What exactly is an automation workflow? And no, it's not robots doing your job!

Automation workflows allow you to send highly personalized communications that make your donors feel special while reducing the manual workload on your end. They give you extra time that you can spend on building relationships with your donors and make them soar to higher levels. Effective donation automation workflows create a donor journey from a first-time donor to a lifelong supporter.

The Best Recurring Donation Automation Workflows Your Nonprofit Should Implement

Recurring Donation Automation Workflow #1: New Donor Welcome Email Series

Every organization should have some sort of process to welcome new donors. This email series should include information about how their gift makes an impact on your mission.

You could include a story about someone who your organization serves, and it is always great to include visuals such as images and videos. However, this is also a good opportunity to remind new donors about the option to be a recurring donor.

The new donor welcome email series serves several purposes, but encouraging your donors to grow their support is why it's the number one recurring donation automation workflow.

Mapping Out a New Donor Welcome Email Series

To map out this recurring donation automation workflow, first think about the usual cadence of your regular emails. Build the welcome email series leading up to the first 'regular' email they can expect. Usually, three to four emails will do the trick.

Here's an example of a welcome series for new donors. The minute someone makes a new donation on your site, they could receive:

1.
    1. Thank You Email
1.
    1. Thank You Video
1.
    1. Call to Action Email: Check Out the Website and Follow You on Social Media
1.
    1. Call to Action Email: Consider a Recurring Gift

Recurring Donation Automation Workflow #2: Recurring Donor Welcome Email Series

Once a donor makes their first recurring gift, create a short recurring donor automation workflow to welcome them to that level of support. The new donor welcome email series is bringing a donor into your organization's impact and mission.

Welcoming a recurring donor should be even more personalized and appropriate for the level of support that they are showing to your organization. You want to be investing back in your donors appropriately.

Mapping Out a Recurring Donor Welcome Email Series

This recurring donation automation workflow should start with important details that the donor needs to know, and you want to be sure to always include a special thank you message.

Ideally, schedule the first email to send the day after the recurring donation is set up. You want to start communication right away so that they remember why you are reaching out to them. Here are some items to include in this recurring donation automation workflow.

1.
    1. Thank You Email: Say thank you, but also give the donor key information that they need to know. For example, inform them about how their gift makes a difference and let them know how a recurring donation works for tax purposes (i.e. they will receive a single tax receipt in January with monthly updates, or whatever your process is). Make sure to include the name and contact information of a member of your team who the donor can reach out to with any questions they may have!

1.
    1. One-Question Survey: Ask the new recurring donor what prompted them to give monthly with a simple one-question survey.

1.
    1. CTA Email: Ask the recurring donor if their employer has a matching gift program in place. Matching gifts are an incredible way to increase generosity, but be thoughtful about this ask. It is common to send a recurring donor a request about matching gifts immediately after the initial thank you email. Consider waiting a day. Spacing out the communications helps your organization stay top of mind for the donor, so don't overdo it too fast.

Note: A good way to handle matching gifts is to include a field in your nonprofit CRM to track that information. That way if someone says that matching gifts are not a possibility for them, you aren't bothering them with irrelevant communications moving forward.

Multi-Channel Workflows

It is worth noting that depending on your nonprofit CRM, you may have the option to send out communications in channels other than email. For example, a truly responsive nonprofit CRM will have multi-channel communication options, such as SMS, sending a letter or postcard, and the functionality to assign a staff member a task to call a donor directly.

These workflow options are just examples to get you started, but get creative and use multiple channels to be truly responsive and connect more with your supporters. Maybe one donor never checks her email, but she would love to chat on the phone. Another person maybe hates phone calls but would love to receive a letter in the mail. Limiting yourself to one channel risks excluding supporters, but only you know what channels are best for your supporters.

Listen to your donors, and build recurring donation automation workflows that create donor experiences that work for your unique group of supporters.

Recurring Donation Automation Workflow #3: Recurring Donor Missed Payment

Perhaps the most important recurring donation automation workflow is the one that is triggered when a payment is missed. Every platform and nonprofit CRM works differently. Some send three email reminders; others send just one. Ideally, your nonprofit CRM will have robust enough automation that you can create a missed payment recurring donation automation workflow that works for your needs.

Tips for a Missed Payment Automation Workflow

These types of communications can be a bit more sensitive because you don't want to come across like a bill collector, but you do want to inform and engage with the donor. Here are some tips to consider when creating this workflow:

- Make sure each email is a bit different and gets more urgent as time goes by.
- Include an EFT conversion option if your system allows that, that's the ultimate retention saver.
- Make sure you check that your automation is activated and stays active. Check what your system does in terms of tracking.
- Have a plan in place for any recurring donors who you cannot reach by email.

Key Takeaways

These three recurring donation automation workflows can supercharge your recurring donation program. However, make sure that you are listening to your donors by creating workflows that center the donor experience. Automation is incredibly powerful, but make sure to revisit your processes for all these three automation workflows on a regular basis to make sure they're still accurate, have the correct contact information with the stories still valid, and the links are still working. Create a recurring email reminder in your calendar to do this, and then watch how automation can generate even greater generosity to your organization!

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